

ASHLAR

USER GUIDE

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Introduction

The purpose of this guide is to help new users understand how to use the CRM as effectively as possible. The guide provides descriptions for the following:

1. How to register your account and create a team
2. How to sign into an existing account
3. How to create and manage companies, contacts, and deals
4. Creating and managing notes for companies, contacts, and deals.
5. Creating and managing task for companies, contacts, and deals.
6. How to associate contact, companies, and deals
7. How to search for companies, contacts, and deals
8. Using the module dashboards to generate reports based on filters

Accessing the Application

Because this is a cloud-based application, there is nothing to install on your local machine. You can access the application by visiting <https://ashlar.app> in your browser.

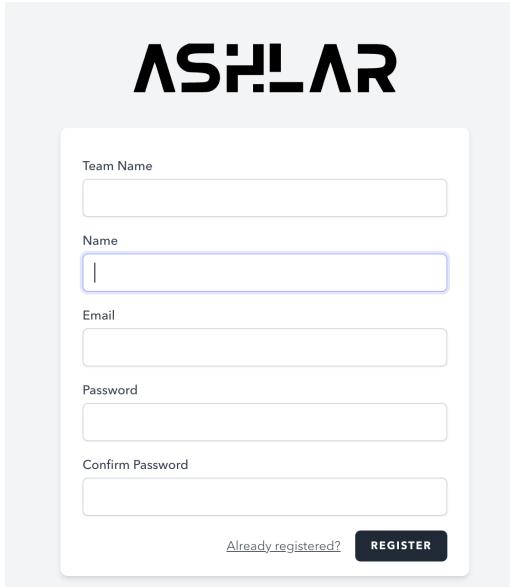
Demo Account

Many of the Ashlar's features require multiple users, companies, contacts, and deals to get the full effect. We have created a demo account, for convenience to allow you to test-drive the application with demo data. You can sign into the demo account by:

1. Visiting <https://ashlar.app> in your browser
2. Sign in with the following credentials:
 - a. Email: jdoe@example.org
 - b. Password: Wgu2023*

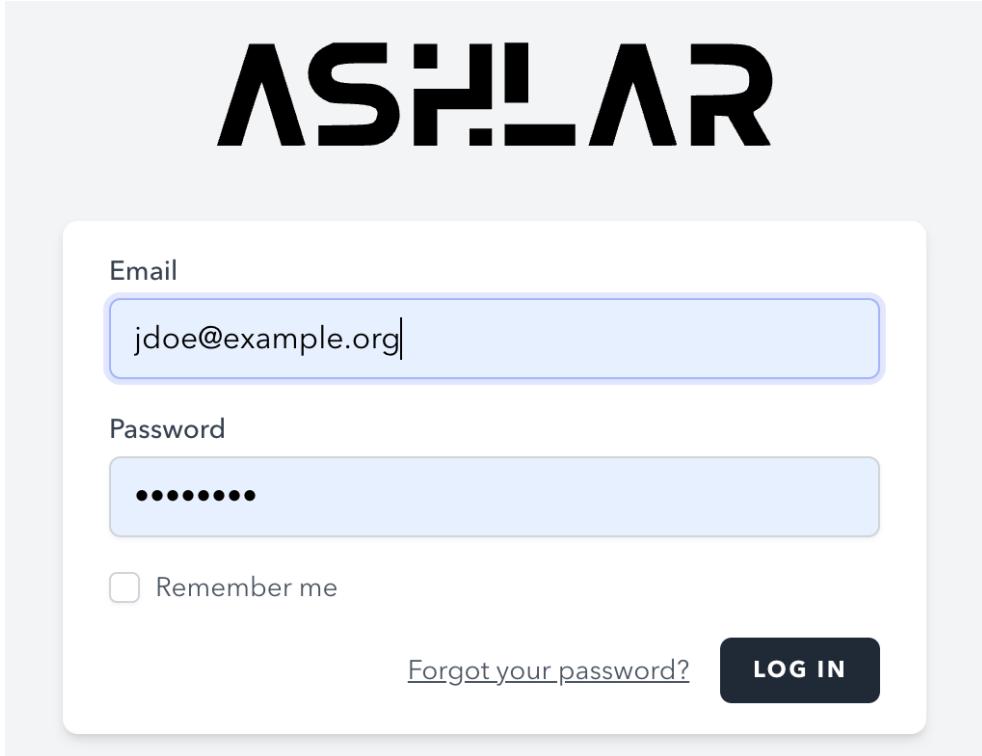
Registering a New Account

1. Visit <https://ashlar.app/register> in your web browser
2. Fill out the registration form. Your **Team Name** should be the name of your organization. Note, a valid email address is required to receive notifications.



Sign into an Existing Account

1. Visit <https://ashlar.app> in your web browser
2. Enter the email address and password you used to register your account



Your Dashboard

After successfully registering or signing into your account, you will be redirected to your dashboard. From the dashboard, you can navigate the application using the primary navigation as shown in the image below, access your team settings, and manage your account.

The dashboard also gives you a brief explanation of the different areas of the application to help you understand how everything fits together.

The screenshot shows the Ashlar CRM dashboard. At the top is a dark navigation bar with the 'Dashboard' tab selected. Below it is a main content area with a large 'ASHLAR' logo. To the left of the logo is a brief welcome message: 'Welcome to Ashlar! Ashlar is customer relationship management (CRM) software provides a platform where companies can organize, automate, and keep track of every interaction and activity that happens within a company.' The main content area is divided into four sections: 'Companies', 'Deals', 'Contacts', and 'Profile'. Each section has a title, a brief description, and an orange 'Get started with [section]' button. Red arrows point from labels to specific elements: 'Primary Navigation' points to the 'Dashboard' tab; 'Team Dropdown' points to the dropdown menu next to 'Eichmann-Bernhard'; and 'Account Access' points to the dropdown menu next to 'John Doe'.

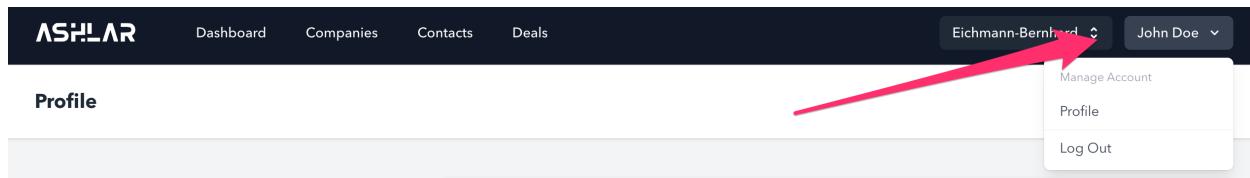
Section	Description	Action
Companies	In Ashlar, company records are for businesses. Company records are used to track more general details like a common phone number or a location's physical address. Companies can have multiple linked contacts for employees, and can also be linked to multiple deals.	Get started with companies →
Deals	In Ashlar, a deal represents an ongoing transaction or opportunity that a sales team is pursuing with a contact or company. It's tracked through the sales process until won or lost. You can associate deals with other records, such as contacts and companies.	Get started with contacts →
Contacts	In Ashlar, we use contacts to represent individuals. Contact records are used to track details like a mobile phone, email address, or job title. Contacts can be standalone or linked to a company, and like companies a contact can be linked to multiple deals.	Get started with contacts →
Profile	Your profile contains information specific to you, and is accessible in every account you have access to. You can upload or change your profile picture, update your basic information, change your password, and enable two-factor authentication.	Manage Your Profile →

Managing Your Profile

Your profile menu will allow you to update your basic profile setup 2-factor authentication, change your password, and view active and recent sessions. This guide is for users to manage and update their own profiles.

Accessing Your Account Tools

You can access your profile and account information on any page by clicking your name in the top right of the screen.



Update Your Profile Information

Access the **Account Menu** and click **Profile**, where you can fill out your name and email address. Your email address also serves as your login id. Once you are satisfied with the information, click the **Save** button.

A screenshot of the 'Profile Information' update form. The form has a light gray header with the title 'Profile Information' and a sub-instruction 'Update your account's profile information and email address.' Below the header are two input fields: 'Name' with the value 'John Doe' and 'Email' with the value 'jdoe@example.org'. At the bottom right of the form is a dark blue 'SAVE' button.

Update Your Password

You can update your password from the same **Profile** page. Your password should be a minimum of eight (8) characters in length.

The screenshot shows a 'Update Password' form. It has three input fields: 'Current Password', 'New Password', and 'Confirm Password'. Below the fields is a 'SAVE' button.

Enable Two-Factor Authentication

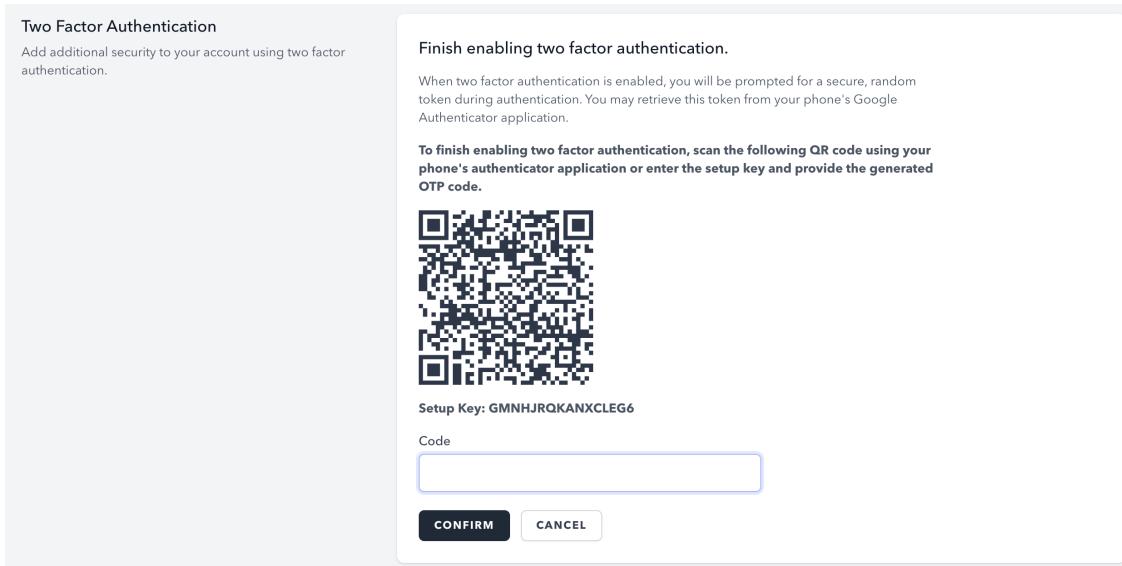
When two factor authentication is enabled, you will be prompted for a secure, random token during authentication. You may retrieve this token from your phone's Google Authenticator application.

1. Before enabling two-factor authentication, you will need to have the Google Authenticator app on your mobile device. This is a free app provided by Google.
 - a. For iOS users, search the App Store for "Google Authenticator", or visit <https://apps.apple.com/us/app/google-authenticator/id388497605> on your mobile device.
 - b. For Android users, search the Google Play Store for "Google Authenticator", or visit https://play.google.com/store/apps/details?id=com.google.android.apps.authenticator2&hl=en_US&gl=US on your mobile device.
2. Back in Ashlar, from the **Profile** page, scroll down to **Two Factor Authentication** and click **Enable**.

The screenshot shows the 'Two Factor Authentication' section. It displays a message: 'You have not enabled two factor authentication.' Below the message is a description: 'When two factor authentication is enabled, you will be prompted for a secure, random token during authentication. You may retrieve this token from your phone's Google Authenticator application.' At the bottom is an 'ENABLE' button, which is highlighted with a red arrow.

3. Confirm your account by entering your password

4. To finish enabling two factor authentication, scan the provided QR code using the Google Authentication app you installed on your mobile device in **Step 1**, and enter the code displayed on your phone.



Manage Browser Sessions

If necessary, you may log out of all your other browser sessions across all of your devices. Some of your recent sessions are listed below; however, the provided list may not be exhaustive. If you feel your account has been compromised, you should also update your password.

A screenshot of a web-based "Manage Browser Sessions" interface. On the left, a sidebar titled "Browser Sessions" contains the text: "Manage and log out of your active sessions on other browsers and devices." The main panel contains instructions: "If necessary, you may log out of all of your other browser sessions across all of your devices. Some of your recent sessions are listed below; however, this list may not be exhaustive. If you feel your account has been compromised, you should also update your password." Below this is a session entry: "OS X - Chrome 172.18.0.1, This device". At the bottom is a "LOG OUT OTHER BROWSER SESSIONS" button.

Managing Companies

In Ashlar, company records represent businesses and organizations. Companies are used to track general details like a common phone number or a location's physical

address. Companies can have multiple linked contacts for employees and can also be linked to multiple deals. Let's follow the steps below to add your first company.

Creating a Company

1. From your dashboard, navigate to **Companies** using the **Primary Navigation**.
2. In the upper right, click “**Create Company**”

The screenshot shows the 'Companies' page in the Ashlar CRM interface. At the top, there is a navigation bar with links for Dashboard, Companies, Contacts, and Deals. On the far right, it shows user names Eichmann-Bernhard and John Doe. Below the navigation is a search bar labeled 'Wildcard Search' with a placeholder 'Search by companies' and a magnifying glass icon. To the right of the search bar are three dropdown menus labeled 'Assigned To', 'Created By', and 'Report filtering'. A red arrow points to the 'Report filtering' dropdown. To the far right of the search area is a large 'CREATE COMPANY' button with a red arrow pointing to it. The main content area is titled 'Create a Company' and contains a table with columns: Name, Assigned To, Created By, City, State, Industry, Date Created, and Last Update. The table lists several companies with their respective details. The last row in the table is for 'McGlynn-Langworth'.

Name	Assigned To	Created By	City	State	Industry	Date Created	Last Update
Denesil-Carter	CD Ciaran Dickinson rbuxah@example.com	MI Miss Erica Kub I ruby.lehner@example.org	South Casimer	New Jersey	Funds, Trusts, and Other Financial Vehicles	Tue May 10 2022	Tue May 10 2022
J Street Digital	AA Alfonzo Altenwerth keyden78@example.net	JO John Doe jdoe@example.org	Tulshoma	Tennessee		Wed May 11 2022	Wed May 11 2022
Kassulke, Konopelski and Ferry	AA Alfonzo Altenwerth keyden78@example.net	MI Miss Erica Kub I ruby.lehner@example.org	North Maude	Massachusetts	Professional and Business Services	Tue May 10 2022	Tue May 10 2022
Kilback Group	SS Stephanie Sanford mckayla73@example.com	MI Miss Erica Kub I ruby.lehner@example.org	Dibbertview	Minnesota	Transportation Equipment Manufacturing	Tue May 10 2022	Tue May 10 2022
Labsadie-Reike	CD Ciaran Dickinson rbuxah@example.com	MI Miss Erica Kub I ruby.lehner@example.org	New Karinaview	Delaware	Broadcasting (except Internet)	Tue May 10 2022	Tue May 10 2022
McGlynn-Langworth	MI Miss Erica Kub I ruby.lehner@example.org	MI Miss Erica Kub I ruby.lehner@example.org	New Rudolph	Ushah		Tue May 10 2022	Tue May 10 2022

3. In the right panel, enter the **company information** into the provided fields. Note that only the **Company Name** field is required to save your new company.
4. Once you have filled in the company information, click **Save** located at the bottom right of the screen.

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Create Company X

Use the form below to create a new contact.

Company Name

Assigned User

Industry

City

State

Postal Code

Timezone

Number of Employees

Description

CANCEL SAVE



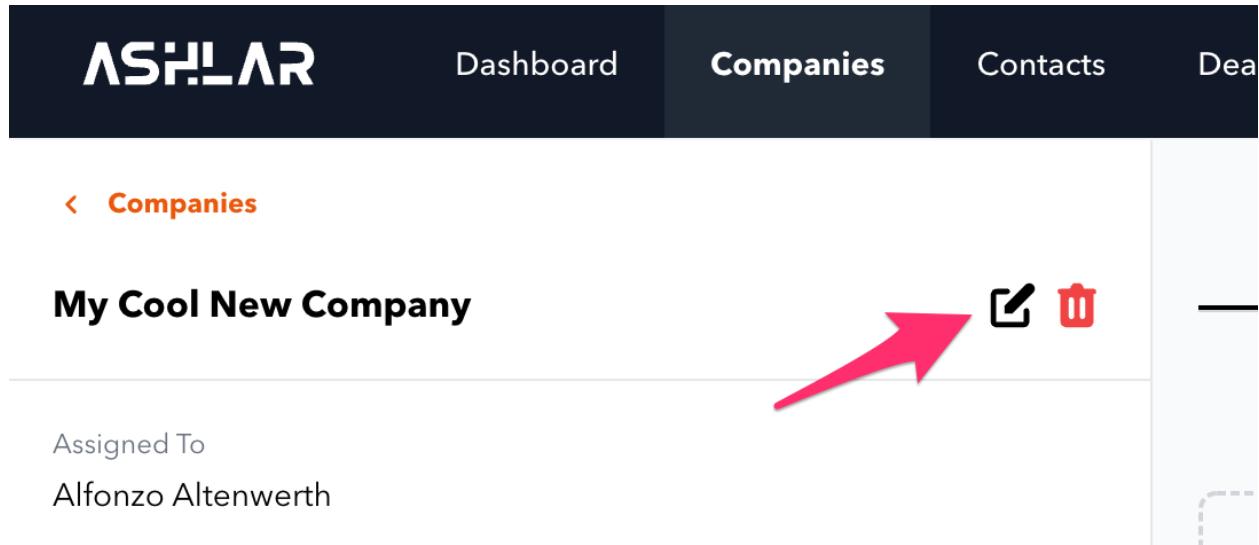
Once your new company is saved, you will be redirected to the **Company Dashboard** as illustrated in the figure below.

The screenshot shows the Company Dashboard for 'My Cool New Company'. The main card displays basic company information: Assigned To (Alfonzo Altenwerth), Created By (John Doe), Industry (Leisure and Hospitality), City (Tullahoma), State (TN), Postal Code (37388), Timezone (America/Chicago), Number of Employees (20), and Description (This is a short description of the company.). Below this, there are three main sections: 'Notes' (with a 'CREATE NOTE' button and a message 'It's lonely in here'), 'Contacts' (with a 'CREATE CONTACT' button and a message 'There are no contacts associated with this resource.'), and 'Deals' (with a 'CREATE DEAL' button and a message 'There are no deals associated with this resource.').

Updating a Company

There will be times that you need to update information about a company. The flow for updating a company is very similar to creating a new one.

1. Click the **Edit** icon located in the top left of the **Company Dashboard** as shown in the figure below:



2. In the right panel, enter the **company information** you wish to update into the provided fields. Note that only the **Company Name** field is required to save your new company.
3. Once you have made changes in the company information, click **Save** located at the bottom right of the screen.

Update Company ×

Use the form below to create a new contact that will be associated with this resource.

Company Name
My Cool New Company

Assigned User
Alfonzo Altenwerth

Industry
Leisure and Hospitality

City
Tullahoma

State
TN

Postal Code
37388

Timezone
America/Chicago

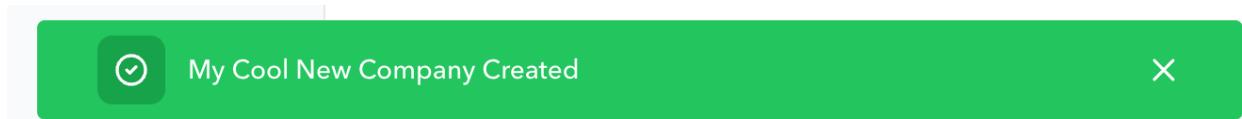
Number of Employees
20

Description
This is a short description of the company.

CANCEL SAVE



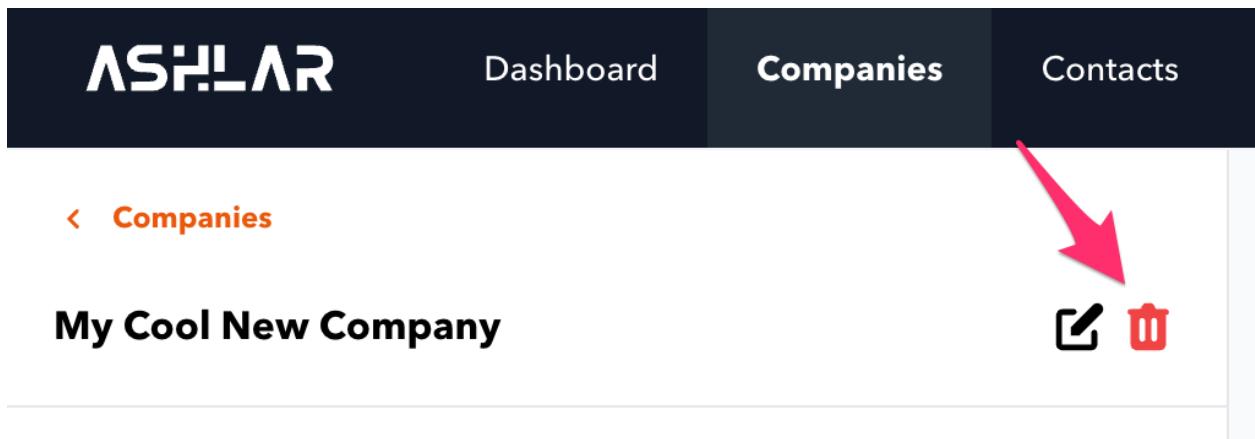
After clicking save, the right panel will close, and a green success message will be displayed in the lower right side of your screen. You will also be able to immediately see your changes on the left panel.



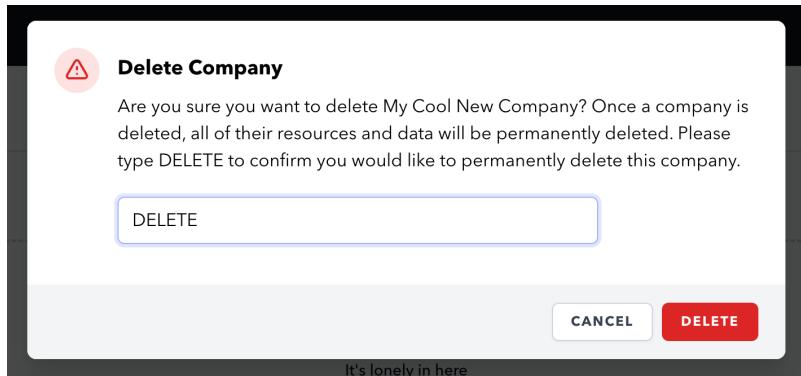
Deleting a Company

Sometimes you will no longer need a company saved to your team. To delete a customer:

1. Click the **trash can** icon located in the top left of the **Company Dashboard** as shown in the figure below:



2. A confirmation modal will appear on the screen asking you to make sure you really want to delete this customer. Deleting a customer will also delete any notes or tasks that are associated with this company.



3. If you are sure, you will need to type “**DELETE**” into the input field. This is case-sensitive and must be typed in all caps. Because this is irreversible, we want to make sure you really want to delete the company.

4. Once you have typed the word delete, you can click the **DELETE** button as shown in the image below:
5. After confirming that you want to delete the company, the company will be deleted, and you will be redirected back to the **Company List** view. You will see a green success message in the lower right-hand corner as a confirmation.



Managing Contacts

In Ashlar, we use contacts to represent individuals. Contact records are used to track details like a mobile phone, email address, or job title. Contacts can be standalone or linked to a company, and like companies a contact can be linked to multiple deals.

Creating a Contact

1. From your dashboard, navigate to **Contacts** using the **Primary Navigation** located at the top of any screen.
2. From the **Contacts List View** page, click “**Create Contact**” located at the top right of your screen.

The screenshot shows the Ashlar CRM interface. At the top, there's a navigation bar with tabs for Dashboard, Companies, Contacts (which is selected), and Deals. Below the navigation is a search bar labeled "Wildcard Search" with the placeholder "Search contacts". To the right of the search bar are two dropdown menus: "Assigned To" and "Created By". Further to the right is a "Report Filtering" section. On the far right of the top bar is a user profile with the name "Eichmann-Bernhard" and a dropdown arrow, and the name "John Doe" with a dropdown arrow. Below the top bar is a large table titled "Create a Contact". The table has columns for First Name, Last Name, Assigned To, Created By, Email, Job Title, Phone Number, Mobile Number, Date Created, and Last Update. There are several rows of data in the table. At the bottom right of the table area is a prominent "CREATE CONTACT" button.

3. In the right panel, enter the **contact information** into the provided fields. Note that only the **contact's first and last name** fields are required to save your new contact.
4. Once you have filled in the contact information, click **Save** located at the bottom right of the screen.



Use the form below to create a new contact.

First Name

Last Name

Assigned User

Email

Job Title

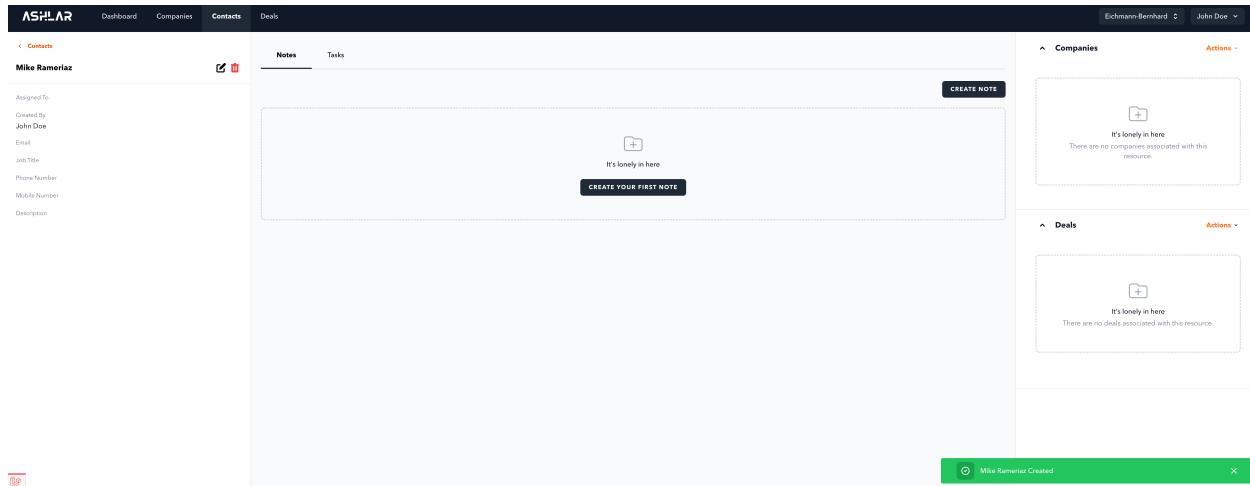
Phone Number

Mobile Number

Description



Once your new contact is saved, you will be redirected to the **Contact View** as illustrated in the figure below.



Updating a Contact

There will be times that you need to update information about a contact. The flow for updating a contact is very similar to creating a new one.

1. Click the **Edit** icon located in the top left of the **Contact Dashboard** as shown in the figure below:



2. In the right panel, enter the **contact information** you wish to update into the provided fields. Note that only the **contact's first and last name** fields are required to save your new contact.
3. Once you have made changes in the contact information, click **Save** located at the bottom right of the screen.

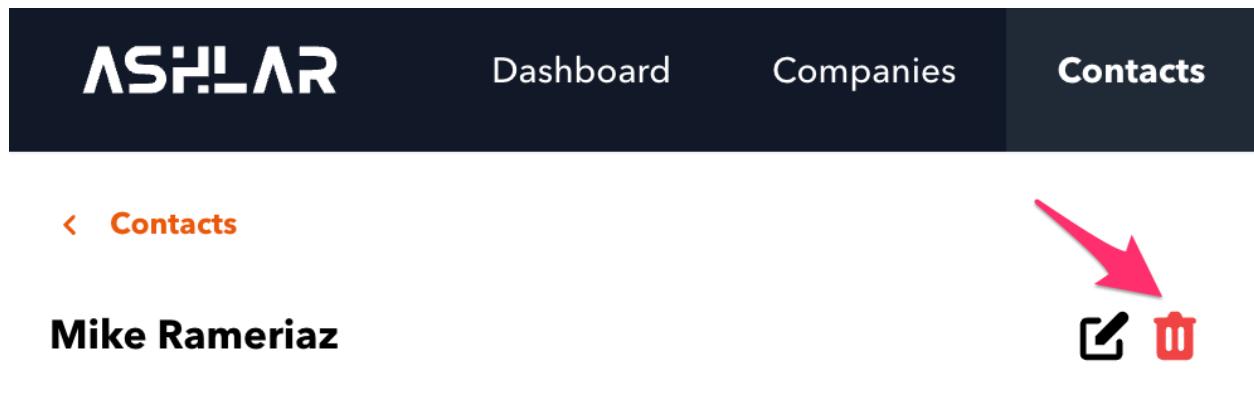
After clicking save, the right panel will close, and a green success message will be displayed in the lower right side of your screen. You will also be able to immediately

see your changes on the left panel.

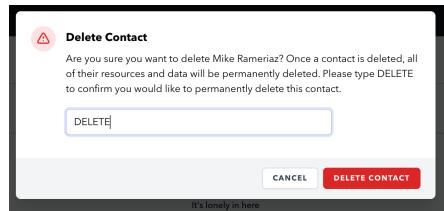
Deleting a Contact

Sometimes you will no longer need a contact. To delete a contact:

1. Click the **trash can** icon located in the top left of the **Contact Dashboard** as shown in the figure below:



2. A confirmation modal will appear on the screen asking you to make sure you really want to delete this contact. Deleting a contact will also delete any notes or tasks that are associated with the contact.
3. If you are sure, you will need to type “**DELETE**” into the input field. This is case-sensitive and must be typed in all caps. Because this is irreversible, we want to make sure you really want to delete the contact.
4. Once you have typed the word delete, you can click the **DELETE** button as shown in the image below:



5. After confirming that you want to delete the contact, the contact will be deleted, and you will be redirected back to the **Contact List** view. You will see a green

success message in the lower right-hand corner as a confirmation.

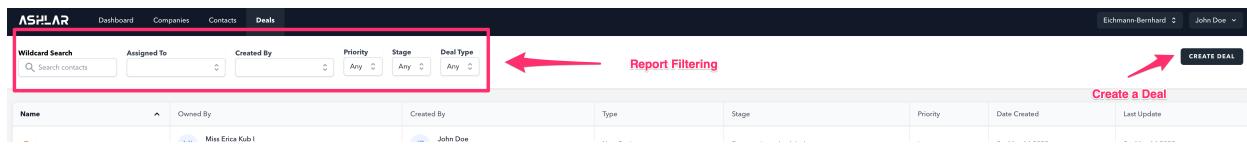


Managing Deals

In Ashlar, a deal represents an ongoing transaction or opportunity that a sales team is pursuing with a contact or company. It's tracked through the sales process until won or lost. You can associate deals with other records, such as contacts and companies.

Creating a Deal

1. From your dashboard, navigate to **Deals** using the **Primary Navigation** located at the top of any screen.
2. From the **Deals List View** page, click "**Create Deal**" located at the top right of your screen.



3. In the right panel, enter the **deal information** into the provided fields. Note that only the **deal's name** field is required to save your new deal.
4. After you have filled in the contact information, click **Save** located at the bottom right of the screen.

Create Deal X

Deal name
e.g. Send a welcome email to Tom.

Who owns this deal?

Amount
0.00

Close date
mm/dd/yyyy CALENDAR

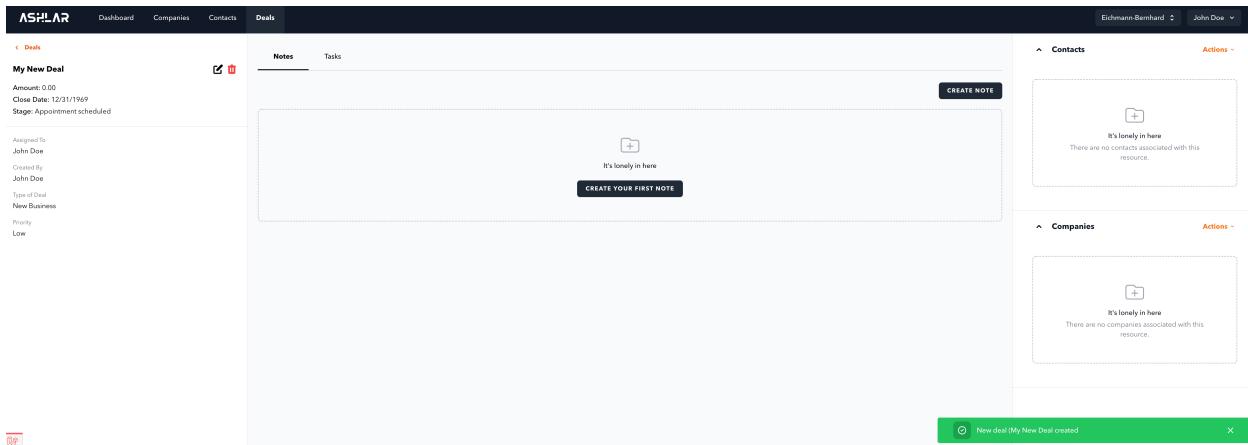
How big of a priority is this?
Low

What stage is the deal in?
Appointment scheduled

What type is the deal in?
New Business

 CANCEL SAVE

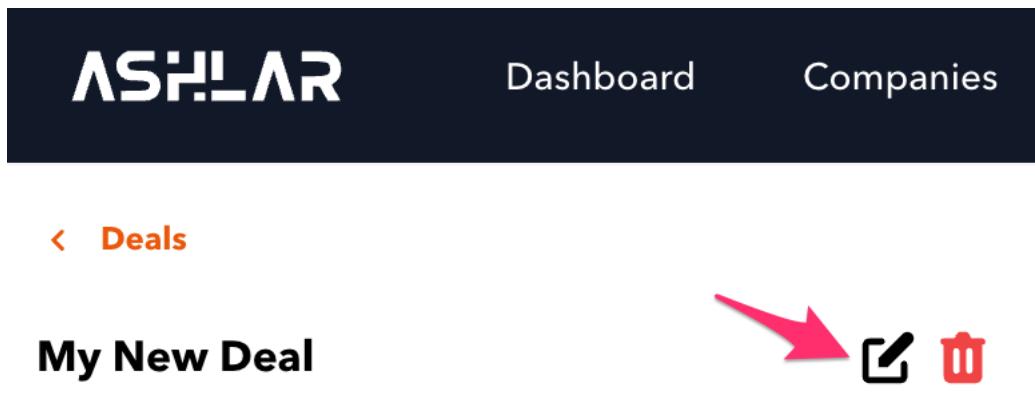
Once your new deal is saved, you will be redirected to the **Deal View** as illustrated in the figure below.



Updating a Deal

There will be times that you need to update information about a deal. The flow for updating a deal is very similar to creating a new one.

1. Click the **Edit** icon located in the top left of the **Deal Dashboard** as shown in the figure below:



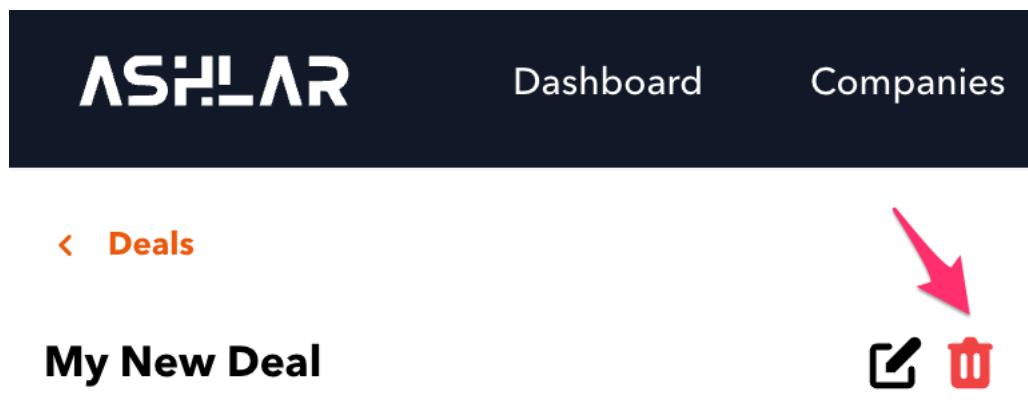
2. In the right panel, enter the **deal information** you wish to update into the provided fields. Note that only the **deal's name** field is required to save your new deal.
3. Once you have made changes in the deal's information, click **Save** located at the bottom right of the screen.

After clicking save, the right panel will close, and a green success message will be displayed in the lower right side of your screen. You will also be able to immediately see your changes on the left panel.

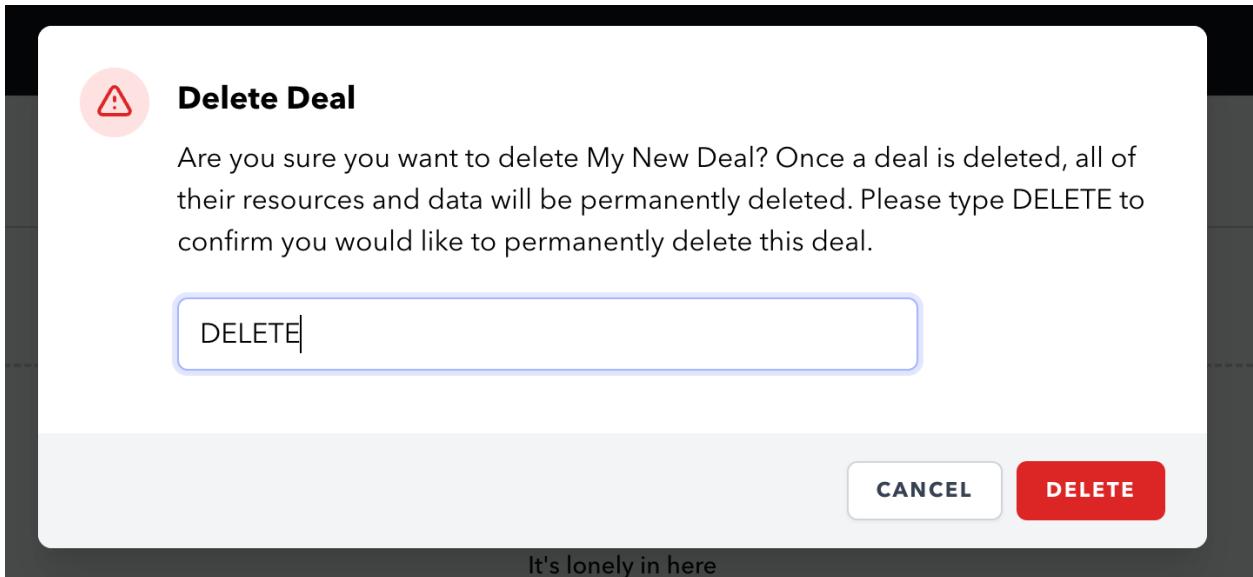
Deleting a Deal

Sometimes you will no longer need a deal. To delete a deal:

1. Click the **trash can** icon located in the top left of the **Deal Dashboard** as shown in the figure below:



2. A confirmation modal will appear on the screen asking you to make sure you really want to delete this deal. Deleting a deal will also delete any notes or tasks that are associated with the deal.
3. If you are sure, you will need to type "**DELETE**" into the input field. This is case-sensitive and must be typed in all caps. Because this is irreversible, we want to make sure you really want to delete the deal.
4. Once you have typed the word delete, you can click the **DELETE** button as shown in the image below:



5. After confirming that you want to delete the contact, the contact will be deleted, and you will be redirected back to the **Deal List** view. You will see a green success message in the lower right-hand corner as a confirmation.

Using Notes

Notes are great way to update and log updates and important information on a contact, company, and/or deal in Ashlar. The notes functionality works the same across all the supported modules.

Create a Note

1. Navigate to the contact, company, deal, or ticket you'd like to log a note on.
2. Click on the **Notes tab** and click the **Create Note** button located in the top right of the middle panel of the screen.

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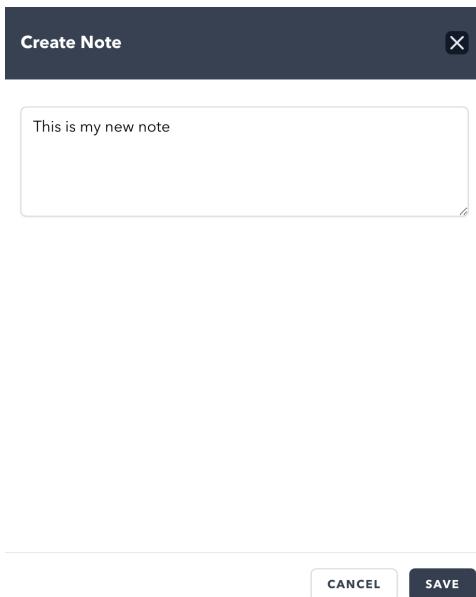
The screenshot shows the Ashlar CRM interface. At the top, there is a navigation bar with links for Dashboard, Companies, Contacts (which is the active tab), and Deals. On the right side of the header, there are user profile dropdowns for Eichmann-Bernhard and John Doe.

The main content area is focused on the 'Notes' section for a contact named Aida Rath. To the left of the notes, there is a sidebar with contact details: Assigned To (Alfonzo Altenwerth), Created By (John Doe), Email (wjacob@yahoo.com), Job Title (Food Tobacco Roasting), Phone Number (+12318328969), Mobile Number (+13044702957), and Description. There are also edit and delete icons.

The 'Notes' section has two tabs: 'Notes' (selected) and 'Tasks'. Below the tabs is a large input field containing the text "It's lonely in here". To the right of this field is a 'CREATE NOTE' button with a red arrow pointing to it. Below the input field is another 'CREATE YOUR FIRST NOTE' button.

On the right side of the interface, there are two collapsed sections: 'Companies' (McGlynn Langworth, New Rudolph, Utah) and 'Deals' (There are no deals associated with this resource).

3. Type the note you would like to leave and click **Save** found in the lower right of the **Create Note** panel.



- Once created, your new note will appear in the middle panel of your screen.

The screenshot shows the Ashlar CRM dashboard. On the left, there's a sidebar for 'Contacts' with a section for 'Aida Rath'. This includes details like 'Assigned To: Alfonzo Altenwerth', 'Created By: John Doe', 'Email: wjacobi@yahoo.com', 'Job Title: Food Tobacco Roasting', 'Phone Number: +12318328969', and 'Mobile Number: +13044702957'. Below this is a 'Description' field with a placeholder 'Description'. In the center, there's a 'Notes' tab selected, showing a note by 'John Doe on 5/14/2022' with the content 'This is my new note'. To the right of the notes tab is a 'CREATE NOTE' button. To the right of the note panel are sections for 'Companies' (listing 'McGlynn-Langworth') and 'Deals' (with a message 'It's lonely in here. There are no deals associated with this resource.'). A green notification bar at the bottom right says 'A New note has been added to Aida Rath.' with a close button.

Update a Note

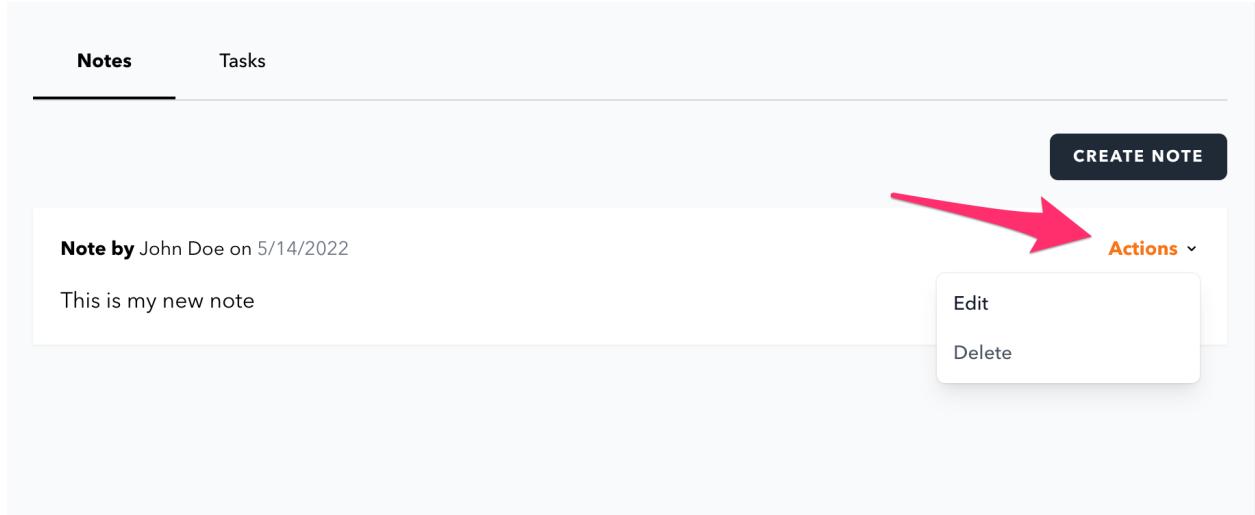
- Locate the note you would like to edit and click on the **Actions** dropdown located on the right of the note panel and select **Edit**.

This screenshot shows the 'Notes' tab selected in the central panel. It displays a note by 'John Doe on 5/14/2022' with the content 'This is my new note'. To the right of the note is an 'Actions' dropdown menu. A large red arrow points from the text above to this dropdown. The menu contains two options: 'Edit' and 'Delete'.

- Make your changes and click the **Save** button found in the lower right of the **Update Note** panel.

Delete a Note

- Locate the note you would like to edit and click on the **Actions** dropdown located on the right of the note panel and select **Delete**.



2. A confirmation modal will be displayed that asks if you are sure you want to delete the selected note.
3. Click **Cancel** if you no longer wish to delete the note, otherwise click **Delete**.
4. If you chose to delete the note, a confirmation will be displayed in the lower right-hand side of the screen.

Using Tasks

Tasks are a great way to keep track of your to-do lists in Ashlar. Like notes, tasks can be associated with companies, contacts, and/or deals.

Create a Task

1. Navigate to the contact, company, deal, or ticket you'd like to create a task for.
2. Click on the **Tasks tab** and click the **Create Task** button located in the top right of the middle panel of the screen.

The screenshot shows the CRM interface for a contact named Aida Rath. The top navigation bar includes links for Dashboard, Companies, Contacts, and Deals. The Contacts section is active. On the left, there's a sidebar with contact details: Assigned To (Alfonzo Altenwerth), Created By (John Doe), Email (wjacob@yahoo.com), Job Title (Food Tobacco Roasting), Phone Number (+12318328969), Mobile Number (+13044702957), and a Description field. The main area has tabs for Notes and Tasks, with 'Tasks' selected. A red arrow points to the 'CREATE TASK' button. Below it, a message says 'It's lonely in here' and 'CREATE YOUR FIRST TASK'. To the right, there are sections for Companies (McGlynn-Langworth) and Deals, both of which are currently empty.

- Type the note you would like to leave and click **Save** found in the lower right of the **Create Note** panel. Only the task name is required. If no user is assigned, the task will automatically be assigned to you.

Create Task

What needs to be done?
Send an email to Tim about the draft plan

Who should do it?
Search for a user.
Alfonzo Altenwerth

When should it be done?
mm/dd/yyyy

How big of a priority is this?
Low

Anything additional to add?
This is the place for you to give a little more detail about the task that needs to be done.

CANCEL **SAVE**

- Once created, your new task will appear in the middle panel of your screen.

The screenshot shows the Ashlar CRM dashboard with the 'Contacts' tab selected. On the left, there's a detailed view of contact 'Aida Rath'. In the center, under the 'Tasks' tab, a single task is listed: 'Task assigned to Alfonzo Altenwerth due on 5/13/2022'. To the right, there are sections for 'Companies' and 'Deals', both currently empty. At the bottom, a green notification bar says 'A new task has been added to Aida Rath.' with a close button.

Update a Task

- Locate the task you would like to edit and click on the **Actions** dropdown located on the right of the note panel and select **Edit**.

This screenshot shows the 'Tasks' tab for contact 'Aida Rath'. A task is listed with the text: 'Task assigned to Alfonzo Altenwerth due on 5/13/2022'. To the right, an 'Actions' dropdown menu is open, showing 'Edit' and 'Delete' options. A large red arrow points to the 'Actions' dropdown.

- Make your changes and click the **Save** button found in the lower right of the **Update Note** panel.

Delete a Task

- Locate the task you would like to edit and click on the **Actions** dropdown located on the right of the task panel and select **Delete**.

The screenshot shows the 'Tasks' tab selected in the navigation bar. A task is listed: 'Task assigned to Alfonzo Altenwerth due on 5/13/2022'. Below it is another task: 'Send an email to Tim about the draft plan'. To the right of the tasks is a 'CREATE TASK' button. A red arrow points to the 'Actions' dropdown menu, which includes 'Edit' and 'Delete' options.

6. A confirmation modal will be displayed that asks if you are sure you want to delete the selected task.
7. Click **Cancel** if you no longer wish to delete the note, otherwise click **Delete**
8. If you chose to delete the task, a confirmation will be displayed in the lower right-hand side of the screen.

Linking Contacts, Companies, and Deals

One of the most powerful features in Ashlar, is the ability to associate contacts, companies, and deals. This helps you keep your information organized. The functionality for each works the same, so for this manual, we will only be covering linking and associating contacts.

Associations for companies, contacts, and deals can all be found on the right panel when viewing any one of those resources.

Note: You will need to have at least one contact created to associate. You will also need to have at least one company or deal to work with.

Associating Contacts with a Deal or Company

1. Use the navigation links at the top of the screen to select either **Companies** or **Deals** a list of resources.
2. Select a company or deal from the list.

- Once selected, located the **Contacts** panel on the right side of the screen and click the action button. You can either choose to create a new contact to associate or associate an existing contact.

The screenshot shows the Ashlar CRM application. On the left, the 'Companies' panel displays details for 'Denesik-Carter', including assigned users (Citibl; Dickinson), created by (Miss Erica Kub), industry (Funds, Trusts, and Other Financial Vehicles), city (South Casimer), state (New Jersey), postal code (56755), timezone (America/Goose_Bay), and number of employees (45). On the right, the 'Actions' section for 'Demetrius Langosh' (Home Appliance Installer) offers two options: 'Associate New Contact' and 'Associate Existing Contact'. A red arrow points to the 'Associate New Contact' button.

- If you select **Associate a New Contact**, a new panel will slide out with the same form we used to create a contact earlier in the documentation. Add your contact's information and click **Save**
 - If you select **Associate and Existing Contact**, a new panel will slide out that will allow you to search for a contact that already exists. Once you have found the contact you would like to associate, click the **Save** button located at the bottom right of the panel.
- After completing the previous step, you will see the contact record appear under the **Contacts** panel on the right side of the screen.

Associating Company with a Contact or Deal

- Use the navigation links at the top of the screen to select either **Contacts** or **Deals** a list of resources.
- Select a contact or deal from the displayed list
- Once selected, located the **Companies** panel on the right side of the screen and click the action button. You can either choose to create a new company to associate or associate an existing company.
 - If you select **Associate a New Company**, a new panel will slide out with the same form we used to create a company earlier in the documentation. Add

your company's information and click **Save**

- b. If you select **Associate and Existing Company**, a new panel will slide out that will allow you to search for a company that already exists. Once you find the company you would like to associate by using the provided search box, click the **Save** button located at the bottom right of the panel.
4. After completing the previous step, you will see the company record appear under the **Companies** panel on the right side of the screen.

^ **Contacts** Actions ▾

Anna Dickinson Actions ▾

Telecommunications Line Installer
erdman.audie@hotmail.com
Phone: +17274428401

Demetrius Langosh Actions ▾

Home Appliance Installer
margaret28@yahoo.com
Phone: +15095825876

5. A contact can be dissociated with a deal or company by clicking the **Actions** dropdown menu.

^ **Contacts** Actions ▾

Anna Dickinson Actions ▾

Telecommunications Line Install
erdman.audie@hotmail.com
Phone: +17274428401

Remove from Resource

Demetrius Langosh Actions ▾

Home Appliance Installer
margaret28@yahoo.com
Phone: +15095825876

Associating Deal with a Contact or Company

1. Use the navigation links at the top of the screen to select either **Contacts** or **Companies** a list of resources.
2. Select a contact or company from the displayed list
3. Once selected, located the **Deals** panel on the right side of the screen and click the action button. You can either choose to create a new deal to associate or associate an existing deal.

The screenshot shows the Ashlar CRM interface. On the left, the 'Companies' view for 'Denesik-Carter' is displayed, showing various details like assigned to, created by, industry, city, state, postal code, timezone, and number of employees. In the center, there's a notes section with a 'CREATE NOTE' button. On the right, there are two panels: 'Contacts' and 'Deals'. The 'Deals' panel has an 'Associate New Deal' button, which is highlighted with a large red arrow pointing to it. Below the 'Deals' panel, a message says 'There are no deals associated with this resource.'

- a. If you select **Associate a New Deal**, a new panel will slide out with the same form we used to create a deal earlier in the documentation. Add your deal's information and click **Save**
 - b. If you select **Associate and Existing Deal**, a new panel will slide out that will allow you to search for a deal that already exists. Once you find the deal you would like to associate by using the provided search box, click the **Save** button located at the bottom right of the panel.
4. After completing the previous step, you will see the deal record appear under the **Deals** panel on the right side of the screen.

5. A deal can be dissociated from a contact or company by clicking the **Actions** dropdown menu.

Reporting

Being able to aggregate the data you need to make decisions is an important part of choosing which CMS you will use. Ashlar makes this easy. Reporting is built into the dashboard view for each of the primary modules, companies, contacts, and deals.

The built-in filters allow you to generate reports by using a wildcard search, who a resource is assigned to or owned by who created the resources, and other filters that are resource based.

Company Reporting

The screenshot shows the Ashlar CRM interface for the Companies module. At the top, there's a navigation bar with tabs for Dashboard, Companies (which is selected), Contacts, and Deals. On the right side of the header are user profiles for Eichmann-Bernhard and John Doe. Below the header, there are three filter input fields: 'Wildcard Search' (with a placeholder 'Search by companies'), 'Assigned To' (with a dropdown menu showing 'John Doe'), and 'Created By' (with a dropdown menu). To the right of these filters is a 'GENERATE REPORT' button. Further to the right is a 'CREATE COMPANY' button.

The **Company** module allows you to filter and create a report using any combination of the following filters:

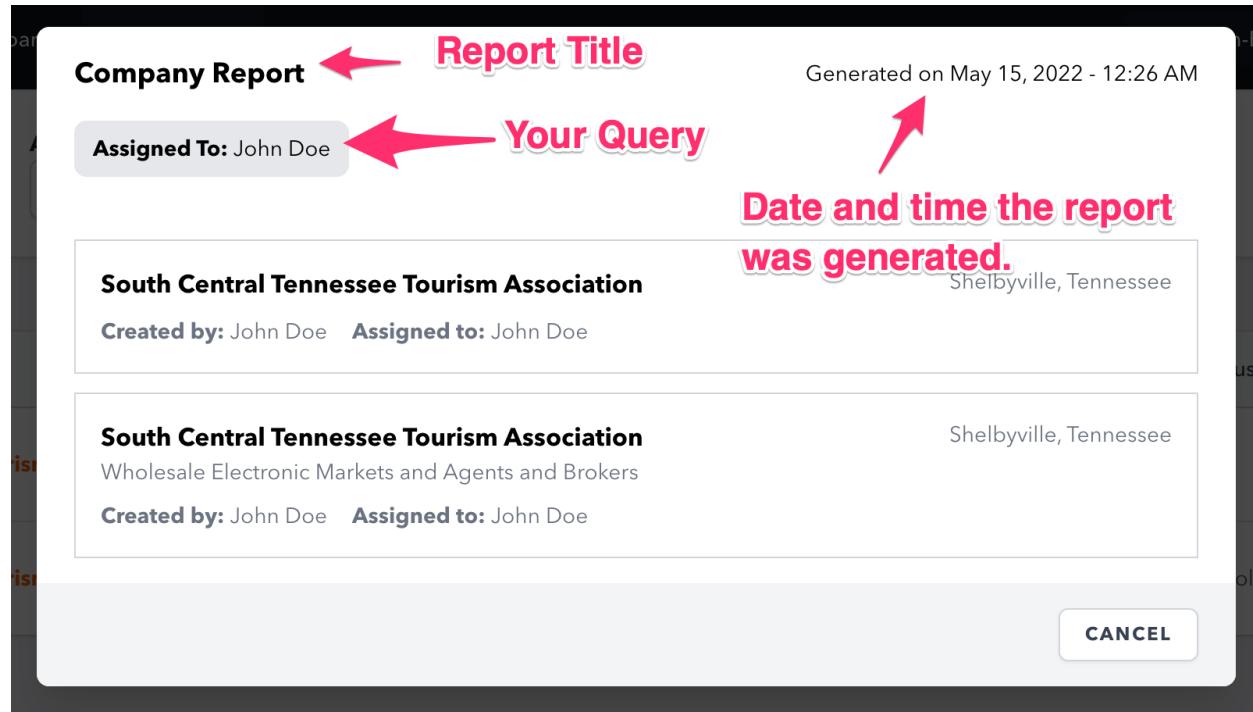
- The **Wildcard Search** allows you to free type and search for values in the name attribute column.
- The **Assigned To** filter allows you to quickly create a list of companies that are assigned to a specific user. To create a filter, begin typing the name of a user. As you type, the system will populate a list of matches.
- The **Created By** filter, like the **Assigned To** filter, allows you to quickly create a list of companies that were created by a specific user. To create a filter, begin typing the name of a user. As you type, the system will populate a list of matches.
- You can sort any column in ascending or descending by clicking on the column header.

Generating a Date/Time Stamped Company Report

The **Companies** module includes a feature that allows you to generate a date and time stamped report the displays only the results of your query. This feature is currently only available in the **Companies** module.

This screenshot is similar to the one above, showing the Companies module interface. It includes the same navigation bar, user profiles, and filter fields. A red arrow points specifically to the 'GENERATE REPORT' button, which is highlighted with a blue border. The 'Assigned To' field also has a blue border around its input field, indicating it is active or selected.

Clicking the **Generate Report** will create the following report view:



Contact Reporting

ASHLAR

Dashboard Companies **Contacts** Deals

Eichmann-Bernhard John Doe

Wildcard Search Assigned To Created By

SEARCH contacts

CREATE CONTACT

The **Contact** module allows you to filter and create a report using any combination of the following filters:

- The **Wildcard Search** allows you to free type and search for values in the **first name, last name, email, phone, and mobile number** attribute columns.
- The **Assigned To** filter allows you to quickly create a list of contacts that are assigned to a specific user. To create a filter, begin typing the name of a user. As you type, the system will populate a list of matches.

- The **Created By** filter, like the **Assigned To** filter, allows you to quickly create a list of contacts that were created by a specific user. To create a filter, begin typing the name of a user. As you type, the system will populate a list of matches.
- You can sort any column in ascending or descending by clicking on the column header.

Deal Reporting

The screenshot shows the Ashlar CRM interface for the 'Deals' module. At the top, there is a navigation bar with links for 'Dashboard', 'Companies', 'Contacts', and 'Deals'. On the right side of the top bar, there are dropdown menus for 'Eichmann-Bernhard' and 'John Doe'. Below the navigation bar, there is a search bar labeled 'Wildcard Search' with a placeholder 'Search contacts'. To the right of the search bar are several filter fields: 'Assigned To', 'Created By', 'Priority', 'Stage', and 'Deal Type', each with a dropdown arrow. On the far right, there is a dark button labeled 'CREATE DEAL'.

The **Deal** module allows you to filter and create a report using any combination of the following filters:

- The **Wildcard Search** allows you to free type and search for values in the **Name** attribute column.
- The **Assigned To** filter allows you to quickly create a list of deals that are assigned to a specific user. To create a filter, begin typing the name of a user. As you type, the system will populate a list of matches.
- The **Created By** filter, like the **Assigned To** filter, allows you to quickly create a list of deals that were created by a specific user. To create a filter, begin typing the name of a user. As you type, the system will populate a list of matches.
- The **Priority** filter allows you to create a list of deals that match the given priority.
- The **Stage** filter allows you to create a list of deals that match the given stage.
- The **Deal Type** filter allows you to create a list of deals that match the given type of deal, either new or existing business.

- You can sort any column in ascending or descending by clicking on the column header.

Have a Question?

We'd love to help. If you come across something that does not seem to be working right, or can't find what you are looking for, please send an email to dberry8@wgu.edu.

Thank you for choosing Ashlar!